The Wars Intelligence Could Not Prevent

Assessment Meets Decision: How Strategic Failure Reshapes the Balance of Great-Power Competition

Silviu Paicu
Researcher, Intelligence and Security Studies
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Abstract

This report examines how the United States and Russia, despite operating two of the world's most sophisticated intelligence establishments, launched wars they expected to be short and are now unable to win. Drawing on pre-war assessments, classified briefings, and official statements, the analysis demonstrates that failure occurred not at the intelligence collection level but at the point where assessment met political decision. In Washington, accurate estimates of Iranian capability and reaction were briefed to leadership and then set aside; in Moscow, there is evidence that an honest estimate was never written or reached the Kremlin. The report traces the organizational cultures and political incentives that produce this breakdown, considers Richard Betts' analysis of intelligence failure as a subset of policy failure, and examines the strategic costs as the wars drag on unwinnable. It further analyzes China's emergence as the uncontested beneficiary of these wars, and concludes that the greatest strategic advantage in modern competition may not belong to the state that knows the most, but to the one whose leaders remain willing to hear and act on what they are told.

Keywords: CIA, China Strategic Gain, Decision-Making, Estimates, Foreign Intelligence Service, Great-Power Competition, Intelligence Assessment, Intelligence Failure, Iran, Iraq War, Leadership, National Security, Policy Failure, Russia-Ukraine War, Russian Intelligence Culture, Strategic Decision, United States, Vladimir Putin, War Planning

Category: Opinion

1. Introduction: Two Intelligence Failures, Same Origin

The United States and Russia run two of the world's most seasoned intelligence establishments. Yet both powers are now stuck in wars their leaders expected to be short, and both are losing ground to states that did not fight. The explanation lies not in the quality of the intelligence, nor necessarily in the kind of political system. It comes down to what happens when an assessment reaches a leader who has already chosen his war.

Operation Epic Fury began on February 28 with the declared aim of bringing down the Iranian regime. Half a year later that regime is still in place, and harder than the one Washington set out to remove. The Strait of Hormuz is now largely closed, a scenario American war games had rehearsed for years, and the campaign went ahead regardless.

> *"The wars in Iran and Ukraine were each built around an opening blow, with no endgame written before the fighting began. That is how a war of choice turns into a forever war."*

Moscow's failure happened one step earlier in the process. In Washington, an assessment existed and was pushed aside; in Moscow, it appears never to have been written. Russian services had agents inside Ukraine and

polling showing a population prepared to fight, and none of it reached Putin as an honest estimate.

2. Wars Without Victories

Wars are fought for political ends. The political object governs everything else, and when it is vague, the fighting has nothing to serve. Neither government matched its declared aim to the war it was prepared to fight. Each was built around an opening blow, with no endgame written before it began.

Moscow's stated aims were expansive: a friendly government in Kyiv, a limit on NATO's enlargement, and a Ukraine pulled back into Russia's orbit. Measured against those aims, the war has run close to the opposite. Ukraine is more anti-Russian than at any point since independence, bound to Europe, and armed as never before. Finland and Sweden abandoned generations of neutrality and sought NATO membership within months of the invasion. Europe is rearming on a scale unseen since the Cold War.

Washington's stated aims were equally clear, yet they too remain unmet. The administration set out to topple the Iranian regime, end its nuclear program, break Iran's missiles and proxies, and keep the Gulf open. But the strike that killed the supreme leader appears to have cleared the way for a harder faction. The nuclear file remains open, and Iran has turned the Strait of Hormuz into a strategic lever.

3. Intelligence Informs; Leaders Decide

The reflex after a fiasco is to blame the intelligence agencies. Richard Betts, drawing on cases from Pearl Harbor to Vietnam, put the decisive errors further up the chain. Failure, on his evidence, sits more often with the officials who receive an estimate than with those who write it. An intelligence failure and a policy failure, in this light, are inseparable, the same event seen from two sides.

> *"An intelligence failure and a policy failure are inseparable, the same event seen from two sides. Analysis and decision form a single loop rather than a tidy sequence."*

That is why an accurate estimate can change very little. Political leaders read intelligence through their ambitions and their public commitments. A leader who has promised a quick win has more to lose by admitting the war is failing. After the shooting starts, fragmentary good news begins to override the cautious estimate.

Strategic inertia does the rest. Reversing course once the troops have moved costs more politically than continuing, so the plan outlives the evidence against it. One study covering conflicts from 1945 to 1989 measured the cost of delay. Mediation begun within three months of the first shots worked in 37 percent of those wars, against 19 percent later.

4. Iran: The Strategic Surprise That Wasn't

The prewar record on Iran is consistent. Agencies in Washington and allied capitals were reported to have judged that Iran could shut the Strait of Hormuz. They expected its government would harden under bombardment and that Tehran would strike Gulf states hosting American forces. Defense intelligence reportedly put an Iranian missile able to reach American soil a decade off. None of this was novel or contested.

Iranian drones and missiles then struck American bases and killed American soldiers, and the administration described itself as shocked. A strategic surprise is something nobody foresaw. This looks instead like something the leadership was told to expect and chose to treat as unthinkable.

The gap was not in the reporting, nor in the willingness to object. Briefing the president on the agencies' assessment, CIA Director John Ratcliffe dismissed the regime-change scenarios as "farcical." Secretary of State Marco Rubio agreed. War is unpredictable, Ratcliffe added, so the regime might yet fall, but that was not something anyone could plan to achieve. Officials close to the planning described repeated Pentagon warnings that Iran could close the strait. Yet the decision ran ahead of all of it.

5. Ukraine: The Warning Never Written

The Russian record is thinner because closed systems bury their mistakes. What evidence there is points to a warning that was never honestly written and, on some accounts, never requested. Recent research on Russian intelligence traces this to a Soviet-era culture that Putin has preserved. Loyalty counts for more than candor, the siege mentality is permanent, and honest assessment is always somebody else's job.

> *"In Russia's intelligence culture, loyalty counts for more than candor, the siege mentality is permanent, and honest assessment is always somebody else's job."*

The services themselves are not weak, and inside Ukraine, the FSB had both the networks and polling to know better. Russian intelligence is built for espionage, and officers rise by stealing secrets rather than by explaining what they mean. Little of what they held appears to have reached the top as honest judgment. In Moscow, telling power what it does not want to hear reads as disloyalty. Putin's army now leans on North Korean infantry and Iranian drones.

6. Lessons That Didn't Take

None of this is new in the recent record of either government. The Iraq War was both kinds of failure at once. Postwar inspectors found no stockpiles, and the case built on the estimate had been shaped to fit a decision already taken. The pattern returns because its source is human rather than bureaucratic. If there is a cure, it is not structural. It is a habit of leadership, welcoming dissent and shielding the analysts who supply it, even when their estimates spoil the plan.

Washington's advantage over Moscow is real, but it is conditional. An estimate that gets written can still be read later, while one that was never written protects nobody. Both capitals are spending down that advantage, and the cost shows up as lost position in the global balance of power.

The war has weakened Russia's claim to major-power status by exposing the limits of its military and political influence. America's partners, meanwhile, have begun to reassess the reliability of American protection. Both losses were self-inflicted at the point where assessment met decision.

7. China Collects What the Others Spend

The power that has gained the most has fought nobody: China avoided the wars of choice that have consumed the United States and Russia. Its position in the Gulf and in Europe has improved without a shot fired. It also holds the largest oil stockpiles in the world, which gives Beijing leverage in the next supply crisis.

The great powers have now provided evidence of what matters most in the competition among them. It is not the volume of secrets collected or the sophistication of the machinery. It is the chain of command from assessment to decision. The leader who hears the truth about the cost and difficulty of a war is in a stronger position than one who does not, even if both are powerful. Beijing has not yet tested that proposition. The temptation to hear only what confirms the plan is not confined to Moscow or Washington. In the contest among major powers, the greatest strategic advantage may not belong to the state that knows the most, but to the one whose leaders are most willing to hear it, and act on it.

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About the Author: Dr. Silviu C. Paicu is a researcher in Intelligence and Security Studies specializing in civil-intelligence relations and the democratic governance of intelligence services. He studied politics and security at University College London and holds a European Joint PhD from the University of Malta and the National Intelligence Academy in Romania. View more reporting by this author →

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